Media Development 2015

The DR Audience Research Department's Annual Report on the use of electronic media in Denmark
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A time bomb under the TV

Apps on TV are a potential hand grenade being thrown directly into the traditional value chain in the TV market. And with user-friendly products such as Apple TV and Chromecast on the store shelves, the pin has been pulled.
Not so many years ago, I believe that most families with young children were in a similar situation to ours. It was time for the kids to go to bed, but TV dictated that their favourite programme started after their bedtime. Apps have changed all that, and now I can start the children’s favourite shows when it suits our family’s schedule. This glimpse of daily life is just one example of how media development and apps are revolutionising TV.

I am now a YouSee customer, and I subscribe to the ‘medium’ package with a handful of self-selected channels. I also have the company’s box, which allows me to record from the TV, rewind and access the archives. I pay over DKK 500 per month for this service.

Today, however, it’s not only the TV package that grants access to content. With DR TV and TV3 Play in addition to subscriptions to TV 2 Play and Viaplay Sport, I can watch content from channels that altogether account for 80% of Danes’ TV viewing. It costs approx. DKK 350 per month, which is about DKK 150 less than my YouSee package.

This development is creating headaches for the traditional TV distributors, and is one of the clearest examples of the disruption of the value chain. As the internet connection also becomes the supplier or the TV signal, pressure increases on the part of the distributor’s business related to classic TV distribution.

Another point in relation to my streaming package is that it also frees me from choosing from among the Danish content providers and instead allows me to spend my money to buy access to international services such as HBO Nordic and Netflix. These services have a wealth of content to offer viewers, some of which is of very high quality. However, this is characterised by the fact that little of what I pay to these services is reinvested in Danish TV content. Thus it is also part of the trend that we have seen in recent years, in which global players are entering national markets and challenging existing ecosystems.

Finally, it should be remembered that Danish media consumption is not a zero-sum game. Most Danes hold a TV subscription, and most of those who purchase access to TV streaming services do so as a supplement to their TV package – not as a replacement. There is much to indicate that Danes now watch more TV than ever before. For example, in 2015 Danes spent 4% more time watching “TV” in total (i.e., content from traditional TV channels, streaming services and YouTube) than was the case in 2013. At that time, traditional TV channel viewing amounted to approx. 88% of total viewing, while the 2015 level is 81%. Viewing time for the TV channels has declined to a limited extent, while the streaming services have more than compensated for the loss. The 15–29 age group has also expanded their overall TV consumption since 2013, with streaming now accounting for 43% of time consumption, compared with 28% in 2013. Although the distribution between use of traditional TV and streaming is shifting during these years, it still covers a growing overall market.

It was not just television that was consumed in new ways in 2015. Changes in media consumption are also being noted elsewhere: From news and social media on mobile phones to the podcast phenomenon on the radio to streaming services that are taking over music listening from our home music collections. And as always, it is young people who are leading these developments. You can read about all this and much more in Media Development 2015.

Dennis Christensen
Head of DR Audience Research
HOW MUCH TIME DO DANES SPEND WATCHING TV DAILY, ON AVERAGE?

Target group: 3+
Source: TNS Gallup TV Meter

2014: 2 h 53 min
2015: 2 h 52 min
TV consumption appears stable on the surface

After dropping steadily since 2010, Danish TV consumption stabilised in 2015. At the same time, the difference between high and low frequency TV viewers has never been greater.
Since its 2010 peak at three hours and 21 minutes daily, Danish TV consumption has dropped to 2 hours and 52 minutes in 2015. While recent years have seen annual drops of up to 8 %, TV viewing in 2015 was virtually unchanged compared with 2014, when Danes on average watched TV for 2 hours and 53 minutes daily.

The stable time consumption conceals a slightly declining reach and a polarisation between high and low frequency TV viewers. In 2015, 66 % of Danes watched a TV channel every day compared with 67 % in 2014. Weekly reach has also dropped slightly.

While slightly fewer Danes watch television on both a daily and weekly basis, the high frequency viewers – which is the one-eighth that watches the most TV – are continuing their very high TV consumption at more than 6 hours watched daily. However, TV consumption continues to drop among the low frequency viewers, who in 2015 watched just 19 minutes of television daily. The difference between high and low frequency audiences has never been greater. Much indicates that especially young Danes are watching less TV as a result of a shift from traditional TV to on-demand services, while it is the older Danes who watch the most TV.

Despite the slightly declining reach and increased polarisation, TV remains strong. 9 out of 10 Danes still watch television every week, and the majority of the time is still spent in the company of the four major channel groups – TV 2, DR, MTG TV and Discovery Networks – which now account for 91 % of the viewing time compared with 90 % in 2014. Sports play a central role in the overall annual result for several of the channel groups.

**TV 2: SPORTS AND NEWS DOMINATE**

The TV 2 channel group continues to be the largest player on the Danish market and with a growth of 0.9 share points, it is also the channel group that experienced the largest growth in 2015. The growth is primarily attributable to TV 2 News and TV 2 Sport, while TV 2 Zulu and TV 2 Charlie lost viewers. The other TV 2 channels emerged from 2015 with their status almost unchanged.

The main channel TV 2 accounts for 23.7 % of Danish TV consumption, which is an increase compared to 2014, and the channel thus remains the country’s largest. Unlike in 2014, TV 2 was forced to share handball broadcast rights with DR1 early in the year and do without the football World Cup over the summer, but in spite of this TV 2 managed to emerge stronger from 2015.

Although the year did not feature the most major of the sporting events, sport in general and handball in particular helped to attract viewers to the new channel TV 2 Sport. The sport channel came out of 2015 with an audience share of 1.3 % and is performing significantly better than TV 2 Film, that was replaced by TV 2 Sport in the channel group. At a time when Netflix is meeting many Danes’ fiction needs, this seems to be a sensible change for the TV 2 group.

TV 2 Zulu is seriously feeling the consequences of increased streaming consumption and absence of sport. The channel has celebrated its 15th anniversary, but with an annual result of 2.2 % TV 2 Zulu doesn’t have a great deal to celebrate, as 2015 was its weakest year since 2003. In addition to the absence of sports and the lack of attractions on the fiction front, the annual result is also affected by the fact that YouSee ceased transmitting the analogue signal at the end of 2014 and moved TV 2 Zulu from the medium to the full package in early 2015.

Using terrorism coverage and election coverage as leverage, TV 2 News enjoyed its best year ever with a 4 % audience share, surpassing the previous record year of 2013. Thus for the first time TV 2 News enjoys a larger audience share than TV 2 Charlie, which ended 2015 at 3.8 % compared with 4 % in 2014.

**DR: SMALL CHANNELS MAKING PROGRESS**

In 2015, DR’s TV channels accounted for 34 % of TV viewing consumption and the channels are continuing to advance with 0.3 share points compared with 2014. The growth conceals the decline of both DR1 and DR Ultra, while the rest of the portfolio has emerged from 2015 in positive territory.

After several years of growth, DR1 ended 2015 with a 22.2 % share compared with 22.4 % in 2014. High ratings for shows such as Den Store Bagedyst and Rigtige Mænd are not enough to compensate for the absence of major events like the Eurovision Song Contest on Danish soil and the FIFA World Cup.

DR2, DR3 and DR K all emerged stronger from 2015. The DR2 growth can be attributed to shows such as the new seasons of Indefra med Anders Agger and Nak & Æd. DR K had its best year ever with a 2.2 % share, primarily attributable to the events marking the 70th anniversary of the Danish liberation in World War Two. And DR3 also enjoyed its best year yet, especially among young viewers. This was due to factors that include growth in prime time and a strong summer season, with broadcast success in diverse topics such as murder, cats, and athletics.

DR Ramasjang is experiencing growth among the 3-6 age group, where programmes such as Hr. Skæg, Sofus and Ramjetterne remain in high demand. DR Ultra noted increased competition from both the main channels and the commercial children’s channels and lost audience share among the 7-12 age group.

**MTG TV: TV3 PULS RAISES EYEBROWS**

MTG TV is still the third largest television
Discovery Networks is defined here as including Kanal 4, Kanal 5, 6’eren, Canal 9 and all the Eurosport and Discovery channels. A number of these channels were not part of Discovery Networks in 2014, but they are specified here as part of this.

Target group: 3+
Source: TNS Gallup TV Meter

AUDIENCE SHARES BY CHANNEL GROUP

<table>
<thead>
<tr>
<th>Channel Group</th>
<th>2014</th>
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<tr>
<td>MTG TV</td>
<td>33.7%</td>
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<tr>
<td>DR</td>
<td>34.9%</td>
<td>35.8%</td>
</tr>
<tr>
<td>Discovery Networks</td>
<td>10.0%</td>
<td>10.3%</td>
</tr>
<tr>
<td>Other</td>
<td>10.5%</td>
<td>9.2%</td>
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</table>
HOW MUCH TIME DO DANES SPEND WATCHING TV EVERY DAY, ON AVERAGE?

High and low frequency viewers comprise the one-eighth of viewers who watch TV most often and least often, respectively.

Source: TNS Gallup TV Meter

**High frequency TV viewers**

Average age: 57
53% are women
They reside all across Denmark, with a majority residing in Zealand and in Northern Jutland
Watch TV for 6 hours and 7 minutes a day
9% watch TV on the Internet more than once a week
12% agree that it is important to be able to watch TV on new platforms
60% use the Internet on mobile phones

**Low frequency TV viewers**

Average age: 23
59% are men
They reside all across Denmark, with a majority residing in Mid Jutland
Watch TV for 19 minutes a day
31% watch TV on the Internet more than once a week
18% agree that it is important to be able to watch TV on new platforms
92% use the Internet on mobile phones
group in Denmark with a 10.7 % share, which is a small loss compared to 2014. Lifestyle channel TV3 Puls represents the largest increase and while TV3 enjoyed a slight increase, the rest of the channels experienced a decline in 2015.

TV3 finished the year with a 4.7 % share, which is slightly up from 2014. Viewer magnets Masterchef, Familien fra Bryggen and Lukusfælden continued their solid performance of 2014, while Mit Plastikmareridt also contributed with high ratings. Paradise Hotel also succeeded in halting the negative development in ratings noted in recent years.

TV3 Puls enjoyed its best result ever with a 1.8 % share compared with 1.6 % in 2014, thanks to the popularity of shows such as Depotjægerne, Depotjagt and Containerjægerne. For TV3+, sports remained the primary driver in 2015. There was increased viewer support for the Danish football league and Champions League, but due to Danish Kevin Magnussen’s exit from Formula 1 and a decline in viewing for American NFL football, the end result was an overall decrease compared with 2014.

Despite progress for two of the group’s five channels, MTG TV suffered a drop in 0.2 share points compared with 2014, overtake by Investigation Discovery. The channel lost viewers than 7’eren, whose spot has been added in new offerings including the talk show Gitte Talks and report show Nyskilt.

Investments in new programmes on Kanal 5 enjoyed a mixed reception in 2015. The spring season meant low ratings for new shows including Ex’ernes kamp, Fornemmelse for Mord og Sex, Lai og Mie, while autumn brought more success in the form of Denmark’s Ninja Warrior. 5. Halvleg, various crime series and of course, national team football Kanal 5 increased by 0.1 share points from 2014 to 2015.

On Kanal 4, former guaranteed performers such as De Unge Mødre and Danmarks Naaste Topmodel experienced difficulties, while interest in new offerings including the talk show Gitte Talks and report show Nyskilt has been muted. 6’eren also lost viewers due to the absence of several major football matches.

Crime channel Investigation Discovery proved to represent a stronger offer to viewers than 7’eren, whose spot has been overtaken by Investigation Discovery. The channel rose by 0.3 share points compared with 7’eren. The other Discovery Networks channels ended the year at the 2014 level overall.

TRADITIONAL BROADCASTERS ARE BEING CHALLENGED ON SEVERAL FRONTS

2016 promises to be a huge year in sports, with the UEFA Euro 2016 in France and the Olympic Games in Rio de Janeiro among other major events. TV 2 and DR have secured rights for the European Championship finals and the Olympic Games, but TV 2 and DR are often sidelined for financial reasons when it comes to bidding on broadcasting rights for major sport events. Whereas MTG TV and Discovery Networks are dealing with entirely different kinds of budgets. MTG TV has for an undisclosed sum acquired the television broadcast rights to Premier League and La Liga games, and has subsequently sold half of those rights to Discovery Networks. For the Olympic Games, Discovery entered the battle for viewers when in the summer of 2015 they purchased the Olympic Games broadcast rights from 2018-2024 across Europe. And although there are set rules that some Olympic Games hours must be available as ‘free to air’ television, the result will in all probability impact Danish viewers since fewer will be able to watch the Olympics on flow TV.

One effect of this is that sport is increasingly moving to the Internet due to greater demands for availability, both from the rights holders and the consumers. Consequently, more Danes can bypass traditional TV packages and get unique content from the broadcasters’ own streaming services — whether it is sports, series or other types of programmes. And when Danes subsequently cut back on their TV packages, the distributors must think of alternatives and turn their attention to their own streaming offerings. In addition, partnerships are emerging on several fronts between distributors and external streaming services. One example of this is the partnership between YouSee and HBO Nordic.

Although traditional TV is facing challenges in several areas, flow TV remains attractive from an advertising standpoint. The digital advertising platforms are overall larger than TV and are also experiencing more growth, but TV advertising sales nevertheless enjoyed a small increase of 2 % from 2014 to 2015 over the first three quarters, according to Kreativitet og Kommunikation. The battle for television viewers’ favour across platforms continues to intensify and will undoubtedly influence the year 2016.
HOW MUCH TIME DO DANES SPEND LISTENING TO THE RADIO DAILY, ON AVERAGE?

Target group: 12+
Source: TNS Gallup Radio-Meter

1 h 56 min 2014

2 h 01 min 2015
Danes are listening to more radio

2015 was the first year since the 1990s in which Danes increased their radio listening time. The year also showed that Danish radio listeners are willing to accept fundamental changes to their preferred channels.

By Dennis Christensen
DR Audience Research
After declining steadily since the 1990s, radio listening time increased by 4 minutes a day in 2015. To say that this heralds a new golden age for radio is probably too far, but the current status shows that radio listening time has increased regularly over the last 1½ years. It is also worth noting that on-demand radio and podcasts are not driving this increase, since time-shifted radio is not yet included in the standard market measurement in Denmark. It is traditional flow radio that is experiencing the growth.

MOVING PROGRAMMES GENERATES MORE RADIO LISTENING

The average Dane listened to radio for 2 hours and 1 minute a day in 2015. Danes are especially tuning into public service radio. DR and Radio24syv experienced growth of 4½ minutes – 4 minutes for DR and ½ minute for Radio24syv. For DR, the digital stations are experiencing growth while the DR FM stations – with the exception of P2 – are declining slightly. Among DR’s digital stations, it is especially P7 MIX and P5 which are the big winners.

It is important to note that P5 plays a special role here. In November 2014 DR initiated a major overhaul of P4 and P5 in which a number of strong P4 programmes were moved to P5 in an effort to create a better offering for the older listeners of P5, while P4 was modernised. The increase in listening time only really took off after this change, and the result can be clearly seen: P5 gained 4 minutes in listening time, while P4 only lost less than a half-minute. This means that the two stations overall are stronger than before the re-formatting, and that the minutes won by P5 were not gained at the expense of P4.

However, the increase in listening time is not evenly distributed among Danes. While listening time dropped among young people under the age of 30, all over-30 age groups increased their listening time. This is perhaps not so surprising in light of the fact that it is especially Radio24syv, P5 and P7 MIX that have experienced increases in listening time over the course of the year.

P5 IS NOW THE FOURTH-LARGEST STATION

In addition to this new development in radio listening, much also remained the same. Just as in 2014, 92 % of Danes listened to the radio on a weekly basis. Public service radio reached 82 % of the population each week, while commercial radio reached 61 %.

DR’s share increased by 0.9 percentage points to 74.3 %, and Radio24syv rose from 2 % to 2.2 %, which resulted in commercial radio share dropping to 23.5 % from 24.6 % in 2014.

The big winner on the 2015 radio market was P5, which moved from the position of ninth most-listened-to station to the fourth most-listened-to station. The restructuring of P4 and P5 can be considered as quite successful and also helps to demonstrate that radio listeners are not so conservative that change cannot happen. On the contrary, the restructuring of P5 represents one of the most successful initiatives of its kind in recent times. The share increase took place primarily at the expense of P4, which not surprisingly had to surrender some of its share. P3 also had to surrender share, most of which was taken over by DR’s digital stations. Commercial stations experienced relatively few and small changes in share.

In addition, digital radio listening is steadily increasing. In 2014 and 2015, the DR and Bauer Radio (Nova, The Voice, etc.) stations listening figures were divided according to platform. In 2014, 29 % of these stations’ listening time took place on platforms other than FM, while the figure for 2015 is 31 %.

RADIO24SYV GROWING STEADILY

Radio24syv is also worth mentioning for 2015. And not because the station has experienced explosive growth. Quite the contrary. Radio24syv has grown steadily since its inception in November 2011, but this growth had for a time gone unnoticed as the focus was on whether the channel would reach its own target of 500,000 listeners per week. And the reality is such that Radio24syv continues to lag some distance from this ambitious goal, but the channel still merits closer study because behind this lack of performance lurks a success: The number of listeners has been on a constant increase from 297,000 listeners in 2012 to 405,000 listeners per week in 2015.

The share began low in 2012 at 1.4 %, but has grown steadily to 2.2 % in 2015. Radio24syv has been successful in attracting more listeners and this can certainly be attributed to a higher resolution quality along with some strong and promoted programmes.

2015 thus became a landmark year for radio. Listening time increased for the first time in decades, and it will be exciting to see if the radio medium can build on this growth in 2016. It is planned that 2016 will be the year in which on-demand radio and podcasts will also be included in the official listening metrics, making it possible to monitor this phenomenon more closely in the coming year. 2016 promises to be no less of an interesting year in radio than 2015.
HOW MUCH TIME DO DANES DAILY SPEND LISTENING TO THE RADIO, ON AVERAGE?

Target group: 12+
Source: TNS Gallup Radio-Meter

2008: 2 h 11 min
2009: 2 h 7 min
2010: 2 h 3 min
2011: 2 h 1 min
2012: 1 h 59 min
2013: 1 h 57 min
2014: 1 h 56 min
2015: 2 h 1 min

THE 10 LARGEST RADIO STATIONS IN DENMARK

Target group: 12+
Source: TNS Gallup Radio-Meter

<table>
<thead>
<tr>
<th>Station</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>P4</td>
<td>37.0 %</td>
<td>35.5 %</td>
</tr>
<tr>
<td>P3</td>
<td>20.8 %</td>
<td>18.6 %</td>
</tr>
<tr>
<td>P1</td>
<td>6.7 %</td>
<td>6.3 %</td>
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<td>P5</td>
<td>1.9 %</td>
<td>5.2 %</td>
</tr>
<tr>
<td>Nova</td>
<td>4.2 %</td>
<td>4.2 %</td>
</tr>
<tr>
<td>P2</td>
<td>3.0 %</td>
<td>3.8 %</td>
</tr>
<tr>
<td>P7 MIX</td>
<td>2.9 %</td>
<td>3.7 %</td>
</tr>
<tr>
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<td>2.5 %</td>
<td>2.6 %</td>
</tr>
<tr>
<td>Radio24syv</td>
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<td>2.2 %</td>
</tr>
<tr>
<td>The Voice</td>
<td>1.6 %</td>
<td>1.6 %</td>
</tr>
</tbody>
</table>
HOW MUCH TIME DO DANES DAILY SPEND ON THE INTERNET, ON AVERAGE?

Target group: 15–74
Source: TNS Gallup for DR Audience Research
Intense competition for user attention on the Internet

Danes continue to spend more time online. However, there are indications of stabilisation – both in terms of time spent online and also in regard to devices used. The challenges are just around the corner for news providers which, despite experimenting with new ways to generate profits, are under pressure from new services and the rampant growth of ad blockers.
THE INTERNET IS BECOMING MORE MOBILE

Overall, Danes spent 5 % more time on the Internet equivalent to an increase to 2.5 hours daily in 2015. The mobile phone is becoming ever more important to Danes, and more access the Internet via their mobile phones than ever before. In contrast, tablet use appears to have stabilised, even though more Danes now have access to a tablet in the home. In addition, Internet access by PC has stabilised after experiencing a downward trend in recent years, reflecting the PC’s continued strength. When it comes to time spent online, the PC represents the majority of it despite a small decline from 2014. Consequently, there is no indication that the PC is in danger of losing terrain to either the mobile phone or tablets. As more and more people acquire mobile phones with Internet access, this places greater demands on the digital media providers who are expected to deliver content around the clock. More than one in four people use a mobile phone in bed upon waking, and among young people, more than 70 % check their mobile phones first thing in the morning. Frequent mobile phone usage is also reflected in the official Danish market survey, which for the first time has assembled an overall user figure across devices, excluding apps. In 2015, many Danish news media such as tv2.dk, ekstrabladet.dk, bt.dk and mx.dk saw more weekly users accessing their sites from mobile phones than from PCs and tablets. The new overall cross-platform user figures also mean that it has become clear that the largest sites, on average, reach more people than multiple radio and television channels in the course of a week.

TEENAGERS USE FACEBOOK MORE OFTEN

Early in the game, major US providers focused on optimising their products for the mobile phone, and especially Facebook’s focus on developing their app has proven to be a success. A majority of Danish mobile phone users have the Facebook app installed on their phone, and over half use the app on a daily basis. Facebook’s continued growth in Denmark is due in part to the fact that the service is able to provide users with a vital practical and social infrastructure. Teenagers in particular increased their Facebook usage in 2015. 87 % of all teenagers use Facebook daily compared with 79 % in 2014. Snapchat and Instagram also have a solid grip on teenagers. Nearly two out of three teenagers use Snapchat daily, while almost half of teenagers use Instagram daily. While Facebook, Snapchat and Instagram continue to grow in Denmark, Twitter’s growth is almost at a standstill. 4 % of Danes use Twitter daily, which is on par with the 2013 and 2014 levels. Although daily Twitter use is unchanged, shifts occur when we examine age groups, where Twitter is losing users under the age of 40, but usage is growing among Danes over 40 years of age. At the same time, Twitter is increasingly being utilised as a medium to get fast news, and to a lesser degree to interact with other people.

SOCIAL MEDIA TO DISTRIBUTE CONTENT

Social networks are also attempting to become independent distributors of video and article content. For example, Facebook has taken up battle with video giant YouTube by launching their own video service. According to American studies, video time consumption on YouTube is still significantly higher than on Facebook, but Facebook has a long term login advantage. This means that Facebook can sell ads based on rich, granular user data, just as Facebook can more easily measure user behaviour across devices – especially on the mobile phone. Video content is not the only area in which a distribution battle is taking place. A number of social media services have launched independent article platforms that attempt to get content producers to publicise content directly on social media rather than pulling traffic back to their own websites. Examples of these services include Facebook’s Instant Articles, Snapchat Discover and Apple News. The service is generally built around a business model in which the content producer gets 70 % of the advertising income while the social platform receives 30 %. These services are still being used by relatively few Danes, but in the long run it may put the commercial content producers under further pressure or give them new opportunities in balancing distribution against advertising sales.

DANES ARE SPENDING MORE TIME STREAMING

American providers are also continuing to impact Danish media use in the area of streaming. 38 % of Danes stream TV on a weekly basis, and it is especially young people who stream frequently. 75 % among the 15-29 age group use streaming services weekly, and it may be assumed that streaming TV content has taken over some of the traditional TV consumption for this target group. On average, young people stream content for more than one hour each day, and this represents a small increase over 2014. By way of comparison, Danes in general spend about 30 minutes streaming each day. The largest relative increase in daily streaming consumption can be seen in the 40-49 age group, which is streaming 20 % more in 2015 than in 2014. Netflix has been growing ever since the service arrived on the Danish market in 2012 and is used weekly by more than one in four Danes, while YouTube reaches almost half the Danish population. After DR’s streaming service, DR TV, was relaunched in June 2014, the service has really gained traction and is now used by over a fifth of Danes weekly. Other
HOW MANY DANES ACCESS THE INTERNET DAILY OR ALMOST DAILY?

Target group: 12+
Source: TNS Gallup Index Denmark

HOW MANY DANES ACCESS THE INTERNET DAILY OR ALMOST DAILY?

Target group: 12+
Source: TNS Gallup Index Denmark

WEEKLY COVERAGE ON TV, RADIO AND INTERNET

Period: January-October 2015
Target group: 7+ (TV), 12+ (radio), 7+ (internet)
Source: TNS Gallup TV Meter, TNS Gallup Radio-Meter, Gemius

WEEKLY COVERAGE ON TV, RADIO AND INTERNET

Period: January-October 2015
Target group: 7+ (TV), 12+ (radio), 7+ (internet)
Source: TNS Gallup TV Meter, TNS Gallup Radio-Meter, Gemius
streaming services like HBO Nordic, ViaPlay and especially TV 2 Play are also growing, but in terms of size they are still some distance from YouTube, Netflix and DR TV. Netflix experienced significant growth from 2013 to 2014 measured in daily time consumption by Danes, but in 2015 it appears that this growth has halted when measured on the basis of time consumption. Conversely, Netflix is continuing to attract more weekly users, which suggests that the average Netflix user spends less time on the service compared with last year, while other streaming services are enjoying progress.

**VERY FEW PAY FOR THE NEWS**

News has historically been free on the Internet, and it appears that a majority of Danes are not yet willing to break with this tradition. This is despite the fact that several Danish news sites have introduced partial paywalls, media login or premium articles. 6 % of Danes pay for news on the Internet and among them is a preponderance of highly educated men who also are typically the biggest news consumers. When Danes encounter a paywall or media login, it adversely affects both user figures and traffic. Politiken.dk introduced media login on their site in March, and it has affected both user figures and traffic. The number of page views dropped by 32 % in the second quarter of 2015 compared with the same period in 2014. Perhaps because it is a challenge to get Danes to pay for their news, berlingske.dk took down their paywall in 2015.

The advertising market is also moving in a more digital direction. From 2013 to 2014, digital advertising sales rose by 7.5 % and ended 2014 at total sales of almost DKK 5.3 billion, with Google and Facebook accounting for slightly over half of the sales. A growing battle for user attention is under way and we are looking at a future with a potential game changer for the entire digital advertising market. Several types of ad blockers are gaining ground – typically in the form of plug-ins or apps that block advertising such as banner ads – and it has become easier to install apps that can block adverts, especially on the mobile phone. 31 % of Danes now block adverts on the Internet, with 9 % blocking adverts on their mobile phone. At the same time, approximately one-quarter use private browsing, while nearly half regularly delete cookies. Danes’ future use of ad blockers and deleting cookies may be pivotal in relation to the future of digital advertising.
HOW MANY DANES USE SOCIAL MEDIA DAILY?

Target group: 12+
Source: TNS Gallup Social Media Life

<table>
<thead>
<tr>
<th>Social Media</th>
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</thead>
<tbody>
<tr>
<td>Facebook</td>
<td>59 %</td>
<td>62 %</td>
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<tr>
<td>Snapchat</td>
<td>11 %</td>
<td>15 %</td>
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<tr>
<td>Instagram</td>
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<td>11 %</td>
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<td>Twitter</td>
<td>4 %</td>
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<td>LinkedIn</td>
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</tbody>
</table>

HOW MANY DANES USE STREAMING SERVICES WEEKLY?

Target group: 12+
Source: TNS Gallup Index Denmark

<table>
<thead>
<tr>
<th>Streaming Service</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix</td>
<td>23 %</td>
<td>28 %</td>
</tr>
<tr>
<td>DR TV</td>
<td>13 %</td>
<td>21 %</td>
</tr>
<tr>
<td>Viaplay</td>
<td>6 %</td>
<td>9 %</td>
</tr>
<tr>
<td>TV 2 Play</td>
<td>4 %</td>
<td>9 %</td>
</tr>
<tr>
<td>HBO Nordic</td>
<td>3 %</td>
<td>8 %</td>
</tr>
<tr>
<td>YouSee Play</td>
<td>2 %</td>
<td>4 %</td>
</tr>
</tbody>
</table>
HOW MANY USE SNAPCHAT DAILY?

Period: 2015
Target group: 12-29
Source: TNS Gallup Social Media Life

- 2013: 24%
- 2014: 37%
- 2015: 48%
Snapchat is the fastest growing social media in Denmark and is very widespread among Danes under the age of 30. The content is more spontaneous than that found on other social media, because it disappears after viewing. But even though Snapchat is very popular among the youngest users, Facebook continues to be their preferred social media.
Snapchat experienced a 140% growth from 2013 to 2015, making it the fastest growing social media in Denmark. Snapchat now boasts nearly 1.2 million monthly users, of which three out of four are under the age of 30. This makes Snapchat one of the social media services in Denmark with the largest share of users under 30. At the same time, young people are also high frequency Snapchat users. Almost two out of three Danish teenagers use Snapchat every day, compared with about a third of the 20-29 age group. But what is it that Snapchat can offer, and why has it taken Danish youth by storm?

**MORE CONTENT, FEWER DECISIONS**
The main draw of Snapchat is that the content disappears after viewing. The user’s digital identity seems less vulnerable, and the user isn’t stuck with embarrassing posts from past years. This feature causes users to produce a different kind of content, one that is more spontaneous and less planned in advance.

“When I post on Snapchat, I post weird faces or pictures that zoom right up people’s noses. On Facebook and Instagram, I really think about what I’m posting. You can’t make any spelling errors, and the commas have to be in the right places.”

**Kristoffer, age 17**

The share of users that produce content is higher on Snapchat compared with the other large social media, all of which have a larger proportion of ‘lurkers’—users that don’t produce their own content themselves, but who prefer to read other people’s content. Especially younger users liberally share snapshots from their everyday lives which they normally would not share on either Facebook, Instagram or Twitter. So users dare to produce more content because the nature of the media is informal, spontaneous and with no strings attached.

“Snapchat is just for whatever is on your mind. On Facebook I think about what I post, because my family is there, too.”

**Line, age 27**

**FOR THE CHOOSEN FEW**
An average Danish Snapchat user has 28 friends on Snapchat. In comparison, Danes have an average of 235 friends on Facebook. Snapchat is reserved for a relatively narrow circle, typically the user’s closest friends, and those with whom the user is already in frequent contact.

“I have a lot of friends on Facebook, but the ones I know really well are on Snapchat.”

**Hassan, age 15**

The time and content limited communication means that users must know each other very well in order to communicate in the brief messages required by the format. Implicit
HOW DO DANES USE SOCIAL MEDIA?

Period: 2015
Target group: 15+
Source: The DR Panel

I post mainly private content       I post mainly public content

I post mainly spontaneous content   I post mainly planned content

I use social media mainly to stay in touch with friends and my social network

I use social media mainly for contact with brands and media
meanings and inside jokes are alive and well on Snapchat, and ‘double chins’ in particular are the preferred motif exchanged between friends.

“If you get a picture of a double chin, you send one back out of pure respect. Your friendship is confirmed if you return the double chin picture.”

Freja, age 16

Most users view all the snaps and stories they receive and since there is no option to sort the content, users sort their friends instead. Snapchat users are not shy about deleting friends as soon as it becomes too much work to view and sort all the stories and snapshots they receive.

“On Snapchat you have to tidy everything up, so I see all the stories. I feel most comfortable when everything has been deleted.”

Cecile, age 17

BRANDS AND MEDIA ARE COURTING SNAPCHAT
Brands and media are courting young people on Snapchat and are banging on the door to be allowed into their world. But space is limited, and how close do young people want to be with brands and media? There are also relatively few users that access Snapchat for their news or contact with celebrities, media and brands. 8 % of Snapchat users use the Discover function, while 20 % receive messages or open stories from celebrities, media and brands. Users actually prefer to follow brands and media that they already follow on other social media. But the content can be difficult to find, and users want to make sure that it is good. Conversely, once a brand or medium has gained a foothold with a Snapchat user, it is placed in a small and exclusive group along with the user’s closest friends.

SNAPCHAT IS DISPENSABLE
Snapchat’s communication format can be viewed as the younger generation’s digital small talk. Direct messaging between users is still by far the most common way of using Snapchat. And there are indications that a large number of users still have yet to discover some of Snapchat’s other features. For example, 10 % of users are not aware of the option of adding messages to a story, while 16 % of users are not aware of Discover.

But although Snapchat’s full potential does not appear to be utilised by users yet, care must be taken not to attach too great a value to the medium among younger users. When young people are asked which social media they could easiest do without, Snapchat is high up on the list. Snapchat could be dispensed with relatively easily, while Facebook is still essential to most young people’s daily lives.

“Life would go on without Snapchat. Facebook is practical and completely indispensable.”

Mathilde, age 16
Snapchat for dummies

Messages/
A Snapchat message contains either an image or a video that disappears between 1-10 seconds after the receiver has opened the message. A message can be replied to with an image, a video or a text message. Snapchat messages can be edited by inserting text, filters, emojis or drawings into the image or video in the message, just as users can add ‘lenses’ to their selfies. The message function also allows live chats. It allows users to add photos from the camera roll, which is not an option when sending a normal message.

In a text chat, content disappears when the conversation is closed unless either the recipient or sender has indicated that the contents are to be saved. It is also possible to video chat directly with one friend at a time using the message function.

Stories/
In Snapchat users can add images and video up to 10 seconds in length per post to their stories. A story is a chronological compilation of these images or videos. Each post in the story can be viewed by either all or selected followers for 24 hours after the post has been uploaded, and users can add more images and videos regularly.

Live/
The live function consists of curated stories – typically from a big event or a city – to which the users contribute their own content. Examples include the New York Marathon or Copenhagen, in which a defined area for a limited period of time can send images or video that Snapchat then selects to add to the overall live story.

Discover/
With Snapchat Discover, users can read and view edited media content from a number of media outlets. For example, users can view and read stories from CNN and National Geographic. This content can be shared with friends using the message function.

About the survey
Two focus groups were conducted on the use of Snapchat in the target groups ages 15-18 and 25 and up. Moreover, the article is based on a survey performed in the DR Panel among 2,400 Danes over age 15.
OF ALL MUSIC LISTENING BY DANES, WHAT PERCENTAGE IS REPRESENTED BY STREAMING?

Target group: 15-60
Source: Epinion for DR Audience Research
Streaming music services have taken over

Streaming music now accounts for a larger share of users’ music listening time than listening to their own music collection. Young people are major consumers of streaming services, but so far everything indicates that streaming and radio can easily co-exist in harmony.
Turn back the clock five years. The personal music collection was Danes’ second-favourite source of music listening. Streaming was a niche area and accounted for 10% of music listening led by the video service YouTube. This picture has now been turned on its head. Radio still accounts for a great deal of listening time, but streaming, led by Spotify, has overtaken the personal music collection. A 50-year epoch which rested on the ownership of music has now been replaced by the mere fact of having access to music.

To illustrate this, we can use as a starting point the distribution of time spent listening to music. 21% of listening time is spent listening to music that the user has acquired either physically or digitally. 35% of listening time is spent streaming. The remaining listening time is spent mainly listening to the radio. Among young people, the picture is of course far more extreme, and in 2015 a total of 55% of their listening time was accounted for by streaming. In this age group, time spent streaming surpasses listening for both the radio and the personal music collection. Although YouTube is very popular among young people, it is the pure music services that account for most of the streaming in this segment.

APPLE MUSIC GETS THIRD PLACE
A huge battle is under way to gain listeners’ favour – particularly among music services. 4 out of 10 Danes use a music service but very few use more than one service. This means that the battle for music streamers is tougher than the battle for television streamers, where it is more common to use more than one service, for example, both Netflix and Viaplay. The major difference on the supply side is that TV services are very focused on unique content, which greatly distinguishes the offer in terms of content. In contrast, the music services offer much the same content to a far greater extent than TV services do, giving users less motivation to use more than one service. This picture appears to be undergoing change, however. For example, Apple Music was the only streaming service to release Dr Dre’s long-awaited 2015 album, and Tidal, which was relaunched in 2015, is also built on offering unique content.

Nevertheless, Spotify is still by far the number one streaming service and is used by approximately 60% of Danes that use music services. This dominance has lessened slightly as a consequence of more music services entering the market. Services such as Deezer, WiMP and Google Play Music are however used by less than 5% of music service users, and are therefore small compared with Spotify. TDC/YouSee/Telmore combined under the common Play brand comes in at a decent second place, and is used by about a third of all music service users. Apple Music was launched with tremendous media attention in June 2015 and many existing iTunes users had great expectations of the service. By the end of October Apple Music had succeeded in reaching 9% of streaming music service users. This meant that the service had in a short period of time surpassed services such as Google Play and Tidal. On the other hand, the figures also show that Apple Music has not attracted more Danes to use streaming music services overall during the first six months of its existence, but rather has found its users among the users of other streaming music services. Both before and after the mid-2015 launch, 4 out of 10 Danes used streaming music services.

FREE OF CHARGE IS TOUGH TO BEAT
When Danes are asked to justify the reasons they use their preferred streaming music service, there is one reason that trumps all others: The service is free of
charge. For no less than 41% of users, this is a major reason they prefer services such as Spotify. This most likely also points to a challenge in making the music services into an even stronger business model. As long as many of the large services can be used free of charge, e.g. as ad-based or trial period-based, then the entry barrier to the music market will be too high for new services. And the providers that currently offer free of charge solutions will risk losing users if they transition to a pure payment-based model. If the current Danish music service users each paid 100 DKK per month for access to a music service, it would amount to a total annual turnover of about 2 billion DKK. This is a level corresponding to the advertising market in traditional TV. Overall, every other music service user indicates that they pay for the service. Because several of the services are offered in conjunction with other paid products, it can be difficult to determine whether the individual user perceives that they "pay" for the service they receive because they are paying for a telephone subscription, for example. All else being equal, however, this indicates that music services now already account for a significant amount of money in the Danish market.

Examining why users would otherwise prefer a particular service, it is primarily the music library size and ease of use that are the crucial parameters. A service such as Tidal, which promotes itself on its superior sound quality and a monthly subscription price of 199 DKK for the best sound experience, is used by approximately 3% of streaming users. Less than every tenth streaming user indicates sound quality as a crucial parameter, and with that in mind it is easy to understand why Tidal has not experienced a major popular breakthrough in Denmark.

PLAYLISTS ARE THE NEW ALBUMS
There has been a great deal of focus on the impact of streaming services on the music industry and the artists' ability to earn money. There has been less focus on how the services are used by the music consumers. But one thing is certain: Playlists are clearly dominant. Half of the users indicate that playlists are the primary way that they listen to music on streaming services. Only 15% indicate that albums represent their preferred listening format. As usual, young people are more extreme and over 60% of them prefer the playlist. No less than 90% of playlist users indicate that their own homemade playlists are a central part of their music listening. It is thus far more common to listen to one's own playlists than to listen to the entire latest album by a current music artist. The album may still be an important springboard for many music listeners, but it is no longer a central part of the music experience.

Playlists have also caught the eye of the music providers, and there is now a very wide range of playlists that have been created by the streaming services or other established media. For instance, Spotify launched Discover Weekly in 2015 as a weekly playlist based on the listening habits of the individual user. Streaming service playlists are also a widespread phenomenon used by half of all playlist users. In this way, streaming services have also entered the radio medium's home turf, where music stations put together playlists for radio listeners. However, nothing suggests that music services and radio cannot co-exist. Even if radio's share of music listening has declined after the advent of streaming services on the music scene, it is to a limited extent, since the shares that streaming services have taken have come primarily from Danes' own music collections. Radio also consists of elements other than music, such as hosts, atmosphere, different content, and for many listeners, radio fulfills a specific function over the course of the day. Radio is also where most Danes hear new music, and although both music services and YouTube are also strongly positioned among young people at this point, there is nothing to suggest that there isn't room for both radio and streaming music.
HOW DO DANES ALLOCATE THEIR MUSIC LISTENING?

Target group: 15-60
Source: Epinion for DR Audience Research

<table>
<thead>
<tr>
<th></th>
<th>2010</th>
<th>2015</th>
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</thead>
<tbody>
<tr>
<td>Radio</td>
<td>4 %</td>
<td>2 %</td>
</tr>
<tr>
<td>Streaming</td>
<td>10 %</td>
<td>35 %</td>
</tr>
<tr>
<td>Music collection</td>
<td>21 %</td>
<td>37 %</td>
</tr>
<tr>
<td>TV</td>
<td>4 %</td>
<td>2 %</td>
</tr>
</tbody>
</table>

WHERE DO DANES LISTEN TO NEW MUSIC?

Period: 2015
Source: Epinion for DR Audience Research

<table>
<thead>
<tr>
<th></th>
<th>15+</th>
<th>15-29</th>
</tr>
</thead>
<tbody>
<tr>
<td>Radio</td>
<td>74 %</td>
<td>57 %</td>
</tr>
<tr>
<td>Music services</td>
<td>31 %</td>
<td>57 %</td>
</tr>
<tr>
<td>YouTube</td>
<td>26 %</td>
<td>47 %</td>
</tr>
</tbody>
</table>
IN WHICH OF THE FOLLOWING MEDIA HAVE YOU SEEN, HEARD OR READ ABOUT THE GENERAL ELECTION DURING THE PAST 3 WEEKS?

Period: 2015
Target group: 18+
Source: Epinion for DR Audience Research

- Radio: 48%
- Print: 39%
- Internet incl. social media: 60%
- TV: 88%

Media Development 2015
TV won the election

The general election received massive cross-media coverage. Despite the fact that half of the population suffered from 'election fatigue' during the campaign, Danes followed the election diligently. Force of habit was in many ways the decisive factor as to which media Danes chose to follow the election campaign. TV was the preferred media and DR and TV 2 achieved the widest reach.
Nearly 9 out of 10 Danes followed the election campaign on television, which was the most common choice of media. Only small variations in TV use were noted across age groups. And in terms of perceived importance, TV is valued higher than the other media. Over half of the Danish population indicate TV as the primary media used to follow the election. When for most people TV is both the most important and the most used election media, it is not least because parts of the campaign were created for TV. This applies especially to the live broadcasts of debates, party leadership rounds and naturally, to election night.

The second most used media was the Internet including social media, where 60% followed the election. The Internet was used mainly to regularly monitor the news feed. While TV enjoyed a solid grip on viewers across many age groups, this is an area in which we see big differences. 89% of young people followed the election on the Internet including social media, while for the oldest users, this figure was 36%. Few people use social media to share their own opinions, preferring instead to follow others’ experiences on election night. The increased use of the Internet and social media among the younger segments of the population is also reflected in the perceived importance. Among those aged 18-29, almost half indicate the Internet as the most important election media; thus the Internet is experienced as more important than TV in this age group.

In third place comes the radio medium, followed by print media. Unlike the Internet and social media, the use of radio and print media during the elections is not characterised by any major generation gap. The election was followed slightly more closely on the radio by younger listeners than by older listeners, and while print media made its strongest showing among Danes over 60, it was also used by more than a third of the 18-29 age group.

**DR ACHIEVED WIDEST REACH**

83% of Danes followed the election with DR on TV, radio and the Internet. DR was thus the media group most used to follow the election, followed by TV 2 in second place in contact with 77% of the Danish population. DR and TV 2 come out strongest largely because of the main channels, DR1 and TV 2. As indicated earlier, the TV medium truly comes into its own during the large live events. Election night was, for example, followed by over 3 million people across the two channels. As with the previous election, a slightly higher number of viewers followed election night on DR1 over TV 2, which viewers attribute to a thorough overview, knowledgeable hosts and easy-to-understand graphics with forecasts and results on the channel.

DR and TV 2 also charted highest on the Internet. 29% followed the election on dr.dk while 25% clicked onto TV 2.dk. When DR and TV 2 are strong draws on the Internet, one of the reasons is that the big TV events attract traffic to the Internet. On election day, dr.dk counted 1 million users who, in addition to following the general news feed, especially used the opportunity to watch the election results for each polling station. Dr.dk also experienced increased visitors with the TV debates and party leader rounds. After dr.dk and tv2.dk, most people followed the election on politiken.dk and ekstrabladet.dk with 17% and 16% respectively. Ekstra Bladet is usually one of the biggest players on the Internet, but users do not necessarily visit the ekstrabladet.dk to follow an election.
WHICH NEWS MEDIUM WAS OVERALL THE MOST IMPORTANT FOR YOU IN FOLLOWING THE ELECTION OVER THE PAST 3 WEEKS?

Period: 2015
Target group: 18+
Source: Epinion for DR Audience Research

TV 36%
DR 36%
TV 2 33%
Politiken 4%
TV 2 regions 4%
Jyllands-Posten 3%
Beringke 2%
Ekstrabladet 2%
B.T. 1%

WHICH OF THESE MEDIA WAS OVERALL THE MOST IMPORTANT FOR YOU IN FOLLOWING THE ELECTION?

Period: 2015
Source: Epinion for DR Audience Research

18-29 30-44 45-59 60+

TV
38% 47% 63% 65%

Internet incl. social media
36% 16% 8%

Radio
5% 6% 6% 5%

Print
3% 4% 6% 16%
CANDIDATE TEST HELPED YOUNG PEOPLE
Many news sites allowed users the opportunity to take a so-called candidate test in which users could provide answers to a series of questions in order to see which politicians with whom they were most and least in agreement. The candidate tests from DR and TV 2 were each taken almost 1.2 million times. The DR candidate test was most popular among the younger voters, who took the test multiple times to a greater extent than other age groups. The candidate test was used to confirm decisions on who to vote for, while for young people, the tests served more to help choose a party and candidate than they did for the entire population. Over half of those who utilised the candidate test on dr.dk also took similar tests created by other media groups. This suggests that Danes seek to confirm their decision using several different sources.

During the general election, social media reached usage levels we have not seen for either the 2013 municipal elections or the European parliamentary elections in 2014. While 44% of the population followed the elections on Facebook, only 6% used Twitter during the election campaign. Twitter is a niche medium in Denmark; it does, however, enjoy a privileged existence among politicians and journalists, but not even during the elections did the social media experience increased use among the entire population.

FORCE OF HABIT DETERMINED THE CHOICE OF MEDIA
Television presence is probably the main reason that 36% perceived DR as the main choice of media, while 33% felt that TV 2 was most important. From here, it is far down the list to third place: Politiken, which across platforms is perceived as the main election media by just 4% of the population.

The choice of media and media service provider is to some extent subject to the force of habit. For example, the viewer profile on election night on DR1 and TV 2 appears identical to the viewer profile on TV Avisen and Nyhederne respectively, while many users of various news sites indicate that they followed the election on those sites because they were already using them. During an election, people largely gravitate toward the media and brands they already use.

The media had gone all in to cover the long-awaited national election, so when the election was finally announced on 27 May the coverage was massive, and continued as such all the way up until election day. Before the election was called, 21% of the population thought that there was too much political news coverage. From the time the election was called and right up to election day, DR Audience Research regularly monitored Danish attitudes toward the election coverage. Half of Danes thought that there was too much election coverage in the Danish media, and this level was relatively stable throughout the entire election campaign. Election fatigue increases with age: While 32% of the youngest respondents felt that there was too much election coverage, that percentage increased to 56% among the oldest respondents. This is probably because older people watch far more TV than the younger generations, and are thus exposed to a much greater number of news and current affairs programmes on the election.
FOUR GROUPS OF TV DANES

Period: 2015
Target group: 12+
Source: TNS Gallup Index Denmark

- 34% Cross viewers
- 5% Dedicated streamers
- 3% Non-viewers
- 59% Flow TV viewers
Streamers also watch TV

There are many myths about Danish TV habits and the assumed world domination of streaming services. Let it be said from the start: Big changes are in progress on the TV market, but the situation at the end of 2015 is that virtually all Danes watch flow TV, though many of them also stream.
Four groups of TV Danes

Cross viewers/
34 % of Danes. Typically between the ages of 30-39. Use both flow TV and streaming services during an ordinary week. They are heavy TV users and regularly watch a total of more than five programmes in any given week.

Flow TV viewers/
59 % of Danes. Typically over 40 years of age. Watch flow TV during a regular week, but use streaming services less than weekly. They regularly watch a total of four programmes during the course of a week.

Dedicated streamers/
5 % of Danes. Typically under the age of 30. Use streaming services during an ordinary week, but do not watch flow TV. They regularly watch a total of four programmes during the course of a week.

Non-viewers/
3 % of Danes. Typically under the age of 30. Use neither flow TV or streaming services in the course of an ordinary week.

At conferences on future media use and through various tech media, one can quickly get the impression that most Danes are no longer watching TV. 9 out of 10 Danes, however, are still watching flow TV each week despite the fact that the medium has lost both viewers and time spent in recent years. That leaves barely a tenth of the population that does not watch traditional TV channels. The recent years' decline in TV viewing therefore does not reflect that the relatively new streaming services dedicated to TV shows and movies have replaced traditional TV. On the contrary, it is an indication that many Danes have slightly reduced their flow TV viewing because they must also make time to use streaming services. Danes who have expanded their TV consumption to also include streaming are clearly the most 'TV-hungry', and they represent about one-third of the population. We call them cross viewers, because they are frequent users of both flow TV and streaming services. Besides cross viewers, there are three other TV groups among Danes: Dedicated flow TV viewers, which is still the largest group, and two small groups consisting primarily of young Danes, which can be characterised as dedicated streamers and non-viewers of either flow TV or streaming.

CROSS VIEWERS ARE STARVING FOR TV

Cross viewers watch more TV content overall than the dedicated flow TV viewers. Their consumption of flow TV is indeed declining, but they still spend a lot of time watching TV. In fact, 4 out of 5 in this group watch flow TV almost on a daily basis. At the same time they are also frequent users of streaming services, though to a lesser extent than they watch traditional TV. The total TV consumption (i.e. flow TV and streaming) by cross viewers is far greater than that of dedicated flow TV viewers and the dedicated streamers. This applies to both the overall time spent consuming TV content and the number of programmes regularly watched during the course of a given week.

It is obvious to assume that cross viewers watch so much TV content because they are the most TV-interested Danes and therefore they explore all of the possibilities. A cross viewer is often in his or her 30s, and traditionally it is not this age group that watches the most TV. Streaming services must therefore be assumed to have expanded this group's overall TV viewing and thus also increased Danes' TV consumption.

FRANK ERICHSEN RATHER THAN FRANK UNDERWOOD

If we look at the content that cross viewers use on the respective platforms, there is a clear tripartite division. There are three types of programmes: those primarily watched on flow TV, those primarily watched through streaming services and those watched on both platforms. Thus they differ from the flow TV viewers who watch roughly all of their TV content on flow TV. The primary difference is that cross viewers watch a large quantity of fiction and drama series through streaming services.

On flow TV, cross viewers watch largely the same TV as other types of viewers, although with a clear preference to programmes with a younger age profile, in that the cross viewers are relatively young. The vast majority of them watch the news – and programmes such as X Factor, Lukusfaelden and Natholdet are even more popular on TV among cross viewers than among those who only watch TV. Genres such as news, current affairs and mass entertainment programmes are primarily preferred to be watched on flow TV – also by cross viewers.

Through streaming, a large percentage of cross viewers have watched some of the
PROGRAMMES WATCHED REGULARLY IN THE LAST YEAR

Period: 2015
Target group: 15+
Source: Norstat for DR Audience Research

<table>
<thead>
<tr>
<th>Programme</th>
<th>All</th>
<th>Cross viewers</th>
</tr>
</thead>
<tbody>
<tr>
<td>TV Avisen</td>
<td>76%</td>
<td>73%</td>
</tr>
<tr>
<td>Bonderøven</td>
<td>48%</td>
<td>42%</td>
</tr>
<tr>
<td>Station 2</td>
<td>47%</td>
<td>43%</td>
</tr>
<tr>
<td>X Factor</td>
<td>43%</td>
<td>50%</td>
</tr>
<tr>
<td>Luksusfælden</td>
<td>42%</td>
<td>48%</td>
</tr>
<tr>
<td>Rita</td>
<td>39%</td>
<td>43%</td>
</tr>
<tr>
<td>Champions League</td>
<td>27%</td>
<td>29%</td>
</tr>
<tr>
<td>Gift ved første blik</td>
<td>22%</td>
<td>27%</td>
</tr>
<tr>
<td>Dybvaaad</td>
<td>19%</td>
<td>29%</td>
</tr>
<tr>
<td>Game of Thrones</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Orange Is the New Black</td>
<td>14%</td>
<td>30%</td>
</tr>
<tr>
<td>Paradise Hotel</td>
<td>13%</td>
<td>21%</td>
</tr>
<tr>
<td>House of Cards</td>
<td>13%</td>
<td>29%</td>
</tr>
<tr>
<td>Homeland</td>
<td>12%</td>
<td>20%</td>
</tr>
<tr>
<td>Jeg er L.O.C.</td>
<td>8%</td>
<td>14%</td>
</tr>
</tbody>
</table>
blockbuster drama series from Netflix and HBO. For these services, most viewers have watched Orange is the New Black, House of Cards, Breaking Bad and Game of Thrones. One of the reasons is that users can watch many episodes in a row on the streaming services, which is especially beneficial for drama series. However, it is interesting that the big streaming successes enjoy far from the same amount of viewing as the big programmes shown on flow TV – not even among cross viewers. A phenomenon such as House of Cards is watched by about 30% of cross viewers, while an old chestnut like Bonderøven is watched by over 40% – and primarily through flow TV. Seems like Bonderøven's Frank Erichsen is still going strong – even among the cross viewers. For the total Danish population, about 13% watched House of Cards featuring its main character Frank Underwood during the past year, while almost half of all Danes watched Bonderøven.

**THE COMBINATION OF FLOW TV AND STREAMING IS A STRENGTH**
The survey emphasises that streaming and flow TV are far from mutually exclusive. There are many examples of programmes that cross viewers watch both through flow TV and streaming services. These are mainly Danish drama series such as Arvingerne and Rita, as well as factual and reality programmes aimed at younger target groups. Paradise Hotel and Jeg er L.O.C are viewed by approximately the same number of cross viewers through streaming and flow TV, where the programmes have each enjoyed decent ratings. A TV programme can thus easily be a success both on flow TV and streaming services, thereby reaching a wider audience through its availability in both places. For Danish providers, presence on flow TV and streaming services is therefore important in order to reach the greatest possible number of cross viewers.

For the individual users, it is also an advantage to be able to combine flow TV and streaming services. Cross viewers themselves explain that streaming and flow TV fill different types of needs, and users prefer one or the other distribution form in different situations. Making a clear distinction, the sofa is a natural companion for TV, while viewing from other places, such as from bed or while on the road, are a better match for streaming. Just as watching TV is about having a common experience, streaming is about having ‘alone time’. For some, flow TV is for weekdays and streaming is for the weekend, while for others, TV is reserved for the hours after dinner and streaming is reserved for when there is nothing interesting on flow TV. In other words, flow TV and streaming fulfil each their own role in the overall TV consumption of the individual cross viewer, and when cross viewers use streaming services, this occurs mainly as an extension of flow TV, and often because users cannot find anything that interests them on the traditional TV channels.
ANOTHER CHANNEL SURFING OPTION — WITHOUT RERUNS

In other words, streaming services provide users with an opportunity to keep surfing to find another choice. And often this choice even remembers where the user left off in the TV series or film that was recently watched. The quality that the vast majority of cross viewers value in Netflix, for example, is that the streaming service remembers where you left off so you can easily continue viewing.

Netflix is the preferred streaming service among cross viewers. No other streaming service comes close to being as big a part of people's daily lives. For instance, three times as many people use Netflix daily than use the second-largest streaming service as measured by number of users, DR TV. The reason for this is obvious when one looks at which feature cross viewers value most in a streaming service: The ability to watch all the episodes in a particular season. Instead of watching three different TV programmes, viewers watch three episodes of the same series. The ability to dive in and engage in-depth with certain content is one of the primary benefits of the dedicated streaming services compared with traditional TV providers, which are more likely to make programmes available once they have been broadcast on television. Among the traditional TV providers, however, we are also seeing a tendency for a high level of streaming viewing of the major drama series and formats such as Gifte ved Første Blik, Rigtige Mænd and Den Store Bagedyst, all of which run as series, are comprised of multiple episodes and which feature a long-term narrative.

On the other hand, it is not as important to cross viewers that a streaming service always offers new content. This is in contrast to the attitude of many Danes toward the TV channels, which are often criticised for broadcasting too many reruns. The concept of 'reruns' does not exist on a streaming service.

IS THE CROSS VIEWER THE TV VIEWER OF THE FUTURE?

It is far from certain that the flow channels will lose their reason for existing in the future — not even among cross viewers. However, this requires that cross viewers remain cross viewers, and do not turn their backs on flow TV, which has already been the case for the dedicated streamers and non-viewers. These groups are still so small that even combined they comprise only about 8% of Danes. However, we note that these groups are growing, and that they are made up of a significantly larger proportion of younger viewers than the population as a whole. This may indicate that a greater transformation is underway. Global manufacturers of TVs and streaming boxes, such as Samsung, Sony, Apple and Google, and TV distributors such as YouSee and Stofa are all focusing on streaming — even for the regular TV screen, which is still the bastion of flow TV. At the same time, Danes will also be able to cut back even further on their TV packages in the coming years. The overall snapshot and the relative size of the groups — cross viewers, dedicated flow TV viewers, dedicated streamers and non-viewers — may thus change radically within a few years. The question is whether this will be the case, or if we will simply see an even clearer division between flow TV and streaming services in relation to the type of content and viewing situations.
HOW MANY DANES USE THE INTERNET ON THEIR MOBILE PHONE DAILY OR ALMOST DAILY?

Target group: 12+
Source: TNS Gallup Index Denmark

20 % 2011

60 % 2015
Your best friend lives in your pocket

The mobile phone is the first thing we look at when we wake up, and the last thing we look at before we go to sleep. It has changed our habits in record time so that we are always online and can swipe for a date, pay the bills and get the news – all on the go. In the future, the mobile phone will be even smarter and will act as our personal assistant.

By Jacob Lyng Wieland & Rasmus Thaarup
DR Audience Research
In the early 00s there began to be focus on the opportunities that the new 3G phone network would provide. Suddenly you would be able to use a mobile phone to send larger amounts of data and watch TV, video, listen to the radio and stream music – to really go online in earnest. But it actually took some time before Danes embraced the opportunities available to them. Although the possibilities to go online with the new small devices actually existed as early as the mid-00s, it was only in 2010 that Danes really began to go online using smartphones. In 2015, over half of the Danish population accessed the Internet on their mobile phones daily.

THE PERFECT STORM

Things began to fall into place around 2010. The Apple iPhone was introduced in 2007, setting new standards for user-friendliness and providing users with reasons to download apps designed for these small devices. Something that other manufacturers did not succeed at. Mobile data prices became significantly cheaper, and Danes no longer had to worry about paying the tidy sum of 10 DKK for downloading 1 MB of data. But of course success required more than just user-friendliness and transparent pricing structures. The perfect storm, and thus increased market penetration by smartphones, occurred when smartphones and social media found each other. In Media Development 2009 we described the four types of mobile phone users. Even then, it was already very clear that one of the user types was very social and sent a large number of texts and multimedia messages. This group was dominated by young women, but they did not own smartphones and did not access the Internet from mobile phones at this point in time. When this large group really transitioned to smartphones and installed Facebook and other social networks, things developed very quickly. Thus arose a perfect storm to the benefit of both social media and smartphones alike.

A DIGITAL SWISS ARMY KNIFE

In addition to social media, other types of apps, products and services also helped to spread the use of smartphones, such as music streaming, GPS, and banking apps. Music streaming was known long before the smartphone became popular, but the services were primarily tied to the computer. With the arrival of smartphones, music streaming became mobile and created value both for the phone and also the music services that utilised streaming, and which were dependent on an Internet connection in order to work.

The smartphone’s ability to always recognise its location through GPS was crucial to the development of map usage, but it also created new dating possibilities, for example. This type of dating app used the phone’s GPS system to display singles in the nearby area.

Banking also began to move strongly into the smartphone market. The mobile phone thus became a financial control centre where users could regularly do their banking. This has now led to the emergence of new forms of payment options in which the mobile phone is used to make financial transactions – such as Mobilepay and Swipp. Today, more than half of all Danes use their mobile phone to make financial transactions over the course of a month.

NEW INTERNET AND MEDIA HABITS

The mobile phone has changed our Internet and media habits and has wedged itself into our lives as a constant factor in our circadian rhythms, because it is particularly suited for short breaks. For approximately 30 % of all Danes, the mobile phone is the first thing they look at when they wake up in the morning, and the last thing they look at before
HOW MANY DANES ACCESS THE INTERNET VIA MOBILE PHONES DAILY OR ALMOST DAILY?

Target group: 12+
Source: TNS Gallup Index Denmark

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>2011</td>
<td>20%</td>
</tr>
<tr>
<td>2012</td>
<td>35%</td>
</tr>
<tr>
<td>2013</td>
<td>45%</td>
</tr>
<tr>
<td>2014</td>
<td>52%</td>
</tr>
<tr>
<td>2015</td>
<td>60%</td>
</tr>
</tbody>
</table>
WHEN DO DANES USE WHICH MEDIA?

Period: 2015
Target group: 15-75
Source: TNS Gallup Digital Life

TV  Radio  PC incl. tablet  Smartphone

In bed in the morning  On the way to work/school  At lunch time  On the way from work/school  Early evening  Late afternoon  Late evening  During the night
What has the mobile phone changed?

- Debit card at hand, e.g. MobilePay and Swipp
- Personal assistant: Sleep rhythm, alarm clock, sport and shopping
- Friends everywhere through social media
- All kinds of media content in your pocket, e.g. Spotify and Netflix
- News around the clock
- Dating in your area, e.g. Tinder and Grindr
- Maps so you can always find your way, e.g. Google Maps
- Photos and video at your fingertips

Radio still has a lot of listeners in the morning, and on the way home from work. The computer is still used by most people during working hours, and TV still has a lot of evening viewers during prime time. But the mobile phone is being used in combination with the older media types virtually around the clock.

At the same time, the mobile phone is increasingly the preferred device when accessing Internet content. In 2014 each Dane spent an average of 35 minutes a day on the Internet via the mobile phone. For 2015 this figure increased to 41 minutes. In the same period, Internet usage via computer dropped from 74 minutes to 71 minutes daily, and in 2015, only the computer was used more than the smartphone when Danes go online. That Danish Internet and media habits are becoming more mobile can be seen on social media, for instance. 24% of Danish Facebook users now access Facebook solely via the mobile phone, while 63% use both the computer and the mobile phone.

WHERE ARE WE HEADED?

It also seems likely that the next transformation is about turning the mobile phone into a personal assistant, where apps communicate, share information with each other and thus get to know us better. Wherever we go, we will be close to other devices that potentially can exchange data with the smartphone. Setting aside the obvious problems with privacy, the possibilities are certainly present that the smartphone will gain more intelligence and help us with many everyday tasks. And we are not talking about a distant future. Apps are already exchanging data in which a computer estimates our tasks based on data provided. For instance, by advising us on the traffic situation on the way home, or making us aware of flight delays.

We are now also seeing watches and other types of wearables that can, among other things, measure your heart rate and which also have access to your smartphone. Continuing to think in terms of possible scenarios, one could imagine that these sensors could, for example, talk with your shopping list and offer advice about exercise and diet based on your personal shopping and exercise history. For example, you get a reminder to pick up broccoli on the way to the supermarket, and an alarm when you ‘forget’ to buy it, because the smartphone compares your shopping list with the receipt after you pay with your watch.

In its brief life, the smartphone has already had a huge impact on media habits, industries and our social life. There is no doubt that this will continue. The smartphone will no doubt also become more intelligent, moving in the direction of a personal assistant that will be more closely integrated into our lives. The big question is therefore how much we will allow the smartphone to interfere in our lives.
HOW MUCH SCREEN TIME DO YOUNG PEOPLE HAVE EACH DAY?

Period: 2015
Source: Norstat for DR Audience Research

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Screen Time (h:mm)</th>
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</thead>
<tbody>
<tr>
<td>13-19</td>
<td>6 h 02 min</td>
</tr>
<tr>
<td>20-24</td>
<td>6 h 50 min</td>
</tr>
<tr>
<td>25-29</td>
<td>7 h 14 min</td>
</tr>
</tbody>
</table>
Generation instant pay-off

Media use by Danish teenagers differs significantly from that of the rest of the population. There is nothing new in that, but in recent years we have seen massive changes. When adulthood begins, however, teenagers change their habits, and it is therefore difficult to predict what future media use will look like.
Older generations were often told that it is healthy to be bored, but you can expect only a blank stare if you say that to a teenager today. They have grown up with a myriad of options, and this is reflected in their use of the media, which changes drastically in step with new technological breakthroughs. One example is teenagers’ use of traditional TV, which dropped by a third from 2013 to 2015, so that they now watch just 65 minutes of television each day.

Teenagers have high expectations of media content, and the same can be said of the way in which the content is presented. They expect instant pay-off when they use media, and this places huge demands on the media providers. The entire broadcast mindset of waiting for something you want to see is foreign to the teenagers. They do not have the patience for content that is just good enough when better content is just a single click away. They simply expect that all content is available when they have the time and inclination, and that the content is presented in an appealing way. This is particularly apparent when it comes to video and TV content.

"I expect all the episodes of a drama series to be ready to watch immediately, and to always be there. One episode a week is really annoying. It’s just dumb waiting time."

Mikkel, age 19

SNACK SIZE AND ON DEMAND
Teenagers are major consumers of YouTube. They represent the age group that most frequently uses the service on a daily basis. A great deal of content is viewed on YouTube, and it illustrates a highly fragmented snapshot of what teenagers use the service for. At the top of the list with no real competition are clips in the ‘fun and games’ category, but there is an extremely long tail in the sense that it is not just one or two clips that everyone watches, but a range of different clips, all of which feature humour and entertainment as a common factor.

The 13-19 age group is particularly interested in the kind of comedy delivered by gaming celebrities such as Swedish PewDiePie, Danish Amin and American Markiplier. Girls also mention another category, beauty, which includes Kristine Sloth’s YouTube channel and other similar channels that focus on fashion, make-up and lifestyle. Unlike teenagers, the 20-29 age group is drawn to content from flow TV in snack-size format – such as the funniest clips from The Ellen Show and The Tonight Show with Jimmy Fallon. The content originates from traditional TV, but is served in snack-size format, so that these young adults can watch clips any time and anywhere. Perhaps this is precisely the reason that social media consumes so much time for teenagers. On social media the snack-size format is dominant, undoubtedly because it fits the mindsets and media habits of teenagers and young people.

"I am completely obsessed with two different YouTube channels that I watch every evening at 6 pm while eating dinner. They are two families that make vlogs every day."

Emmel, age 18

Netflix is also popular among teenagers, though its reach is not as wide as that of YouTube in this target group, probably because it costs money. On the other hand, teenagers spend a great deal of time on Netflix once they do become paying users – and for longer periods than they spend on YouTube. Overall, the two services account for over one hour of teenagers’ time consumption each day, and for many, usage is almost addictive in nature:
SMALL SCREENS BEAT THE TV

The teenagers’ preferred device is the smartphone, and it cannot be done without under any circumstances. It is especially the girls who have lost their hearts to the smartphone, while teenage boys also like laptop computers. Screen time is the total time which the teenagers spend on various devices. In other words, screen time does not refer merely to time spent on entertainment, but also to time spent doing homework, for example, on digital devices. For teenagers, this total screen time amounts to over six hours a day. Although teenagers watch less flow TV than in the past, nothing indicates that TV is losing its influence. Traditional TV is just one of the things that teenagers use the TV for. Altogether, traditional TV viewing according to the teenagers themselves accounts for about a third of the daily screen time, and the TV is also used for streaming and console games. If you ask young people what they associate with traditional TV, they mention three things in particular: Secondary viewing (when the TV is on in the background), major TV events and relaxing with the older generation.

“I watched movies with my dad on TV3+. At my father’s place there’s no such thing as Netflix, streaming or smart TV. It’s just the good old big TV package, and it’s just like being a kid again checking through the TV listings to see what’s on.”
Simone, age 19

FROM TEENAGER TO ADULT

If you take a look at teenagers’ and young adults’ favourite apps, you can see a clear evolution from a dedicated interest in entertainment, fun and quirkiness to an interest in more practical matters. This evolution expands outward from a narrow, inward-looking focus to a broader perspective with an interest in society. For many, the teenage years are filled with hardships and many major issues with no obvious answers or simple solutions. One way to seek distraction from these concerns is to use media offerings as entertainment. Moreover, the daily lives of teenagers are characterised by learning, virtually regardless of which line of education they are pursuing, and therefore they may need the relaxation provided by media more than other target groups. As teenagers transition into the young adult age group between the ages of 20-24, and as their responsibilities grow, their focus shifts towards more practical apps. Social media and music also fills a lot of time for these young adults, but there are fewer apps that just provide entertainment. In the 25-29 age group, interest in news apps flourishes while social media, practical apps and music still play a large role. The 25-29 age group’s interest in news apps highlights the evolution from a teenager’s dedicated interest in entertainment, fun and quirkiness to a young adult’s practical interests and more community-orientated vision. Interest in music is seen across all of the target groups. Over half of those aged 13-29 use online music services daily.
DO TEENAGERS HERALD SIGNIFICANT CHANGES?
Teenagers’ heavy consumption of snack-sized content on services like YouTube, Facebook and Snapchat combined with their decreasing use of traditional TV is a significant development not seen to the same extent among other target groups. In comparison, there was a 5% decrease in time spent on traditional TV among the 20-29 age group over the past two years, which is reminiscent of the decrease characterising the population as a whole. At the same time, the 20-29 age group spends more than twice as much time watching TV each day than teenagers.

The changed media habits are viewed as a structural development across the Nordic countries, and if one imagines that teenagers’ current media use is a glimpse into future Danish media habits, it will have enormous implications for the media industry. If we imagine a future that is primarily shaped by the media use of today’s teenagers, it will be difficult to make money producing traditional radio, print newspapers and traditional television in Denmark, because these are media products that teenagers from an early age are already finding difficult to see the relevance of. Moreover, one can imagine that content such as Netflix’s fiction series will have even greater success than they have today, and there will be new global players like Amazon. Danish-produced commercial flow TV will experience pressure because Danes will increasingly become global media users rather than Danish media users. They will therefore only seek Danish media content when it is directly relevant to them. Distribution will be no obstacle or limitation, and Danish stakeholders will be required to contribute unique content that cannot be obtained from global providers if they are to have a role in the future media market.

One could argue that the developments among teenagers simply illustrate a phase of life and do not explain the direction the rest of the population is heading. The answer probably lies somewhere in between the two extremes, but there is no reason to believe that teenagers will completely abandon their current media habits. They will most likely take them along into adulthood.

About the survey
The study was conducted in Sweden, Norway, Finland and Denmark in June-October 2015. The study consisted of a qualitative preliminary study in the form of mobile ethnography with fifteen Danes aged 13-29. In mobile ethnography, respondents report on their daily lives with the help of images, video and audio, which they upload using their mobile phones. The qualitative preliminary study was followed up with a quantitative study in October with 1,000 respondents per country. The study was funded by Nordvision.
HOW TEENAGERS SPEND THEIR SCREEN TIME

Period: 2015
Target group: 13-19
Source: Norstat for DR Audience Research

- Computer: 36%
- Smartphone: 30%
- TV: 20%
- Tablet: 7%
- Gaming console: 4%
- Radio: 3%

57
HOW MUCH TIME DO DANES SPEND LISTENING TO PODCASTS AND RADIO DAILY, ON AVERAGE?

Time spent listening to podcasts is an estimate based on multiple sources.

Period: 2015
Target group: 12+
Source: TNS Gallup Radio-Meter

- Podcast: 6 min
- Radio: 2 h 01 min

Total: 2 h 06 min
Will 2016 be the year of the podcast?

The podcast has been a niche area in the shadow of traditional flow radio. In recent years, we have noted a small but growing trend in this area in Denmark, and the media may be on the threshold of a minor breakthrough. However, this will require certain basic conditions are in place.

By Peter Niegel
DR Audience Research
Unlike the television market, where on-demand has become mainstream with services such as Netflix and Viaplay, only 4% of Danes listen daily to radio on-demand and podcasts, while 10% do so at least weekly. Time spent listening to radio on-demand overall represents approximately 6 minutes daily per Dane as opposed to 121 minutes of flow radio. In comparison, Danes spend over 30 minutes a day streaming TV programmes and movies. At the beginning of 2016, podcasting is still living a niche existence in the shadow of other offerings such as flow radio and streaming services like Spotify. In other words, the large-scale publicity granted to podcast media with series such as Serial and Danish media stakeholders such as Politiken’s and Radio24syv’s focus on podcasting has not yet led to the same dramatic increase in use as we have noted in the TV market.

However, after approximately 10 years of tentative efforts, there are now indications that podcasting may be on the verge of a minor breakthrough. In the last year, we have seen a slight upward trend in the area in Denmark, while podcast media in the US has undergone rapid development both in terms of increased demand and an increased share of total listening. This development is interesting from a user behaviour consideration, but it is also an interesting development for the medium of radio itself. This is because on-demand gives radio content an even bigger lifespan outside of the radio medium because the content isn’t restricted to format, function and atmosphere, which is very much the case for flow radio. Instead, radio content – as it was before TV entered the market in the 1950s – will be produced and thought of as a forefront media. A forefront media that, combined with recent years’ development within mobile telephony, will make it easy to use where, when and how the user chooses.

**BASIC CONDITIONS FOR RADIO ON-DEMAND SUCCESS**

During 2015, DR Audience Research carried out an analysis of high and low frequency listeners’ use of on-demand radio and podcasts to better predict their potential in the Danish market. The survey shows that if radio-on-demand is to achieve a breakthrough in Denmark, some basic conditions must be in place.

First of all, if the technical platform for on-demand content does not work perfectly on both the mobile phone and the PC, many users will not bother to pursue it. On-demand is a new media for the vast majority of users, which is why the entry barriers for new listeners must be as low as possible in order to ensure a positive first impression.

The survey also shows that on-demand media’s user-friendliness is a vital factor for users. In contrast to radio, which is experienced as 100% sound without a visual presence, on-demand media is experienced as 50% audio and 50% visual presentation. User-friendliness in connection with finding and downloading on-demand content is therefore just as important as the design of the audio products in connection with the use of radio on-demand.

**DANISH CONTENT IS CENTRAL**

It is only when a functioning technological platform and a relevant interactive design solution are in place that on-demand users will be able to relate to the media’s characteristics, where active users discover that radio on-demand offers unique options and different uses than traditional radio – and that it can fit into everyday life where, how and when it suits the users. A personalised auditory content service where the listener can choose freely from all available content and which is perceived as a promising and exciting possibility. A possibility which,
however, has so far consisted mainly of radio programmes previously broadcast on Danish flow radio. The end of 2015 saw a host of new programmes developed exclusively for the podcast medium, for example from DR, a number of small independent producers, and Politiken. The importance of unique Danish-produced podcasts must not be underestimated, because radio and podcasts are by their very nature national and intimate media. Danes want to hear Danish voices and get Danish perspectives on the issues that concern them. If on-demand in Denmark is to move from niche to mainstream usage, the universes should be constructed under the protective wings of the strong Danish flow formats so listeners can hear podcasts alongside flow radio using the same players and radio apps that Danes already use to listen to Danish flow radio.

FROM NICHE TO SMALL MAINSTREAM PHENOMENON

With iTunes in the lead, it is the large international services with their good technical solutions and easy navigation that have introduced the podcast niche to first movers in the Danish market, but it is up to the national Danish producers to cultivate podcasting and transform it from a niche medium to a (small) mainstream phenomenon. And that brings us back to the key problem of this new medium: Will on-demand’s difficulties getting established in the Danish market exceed users’ desire to obtain access to the medium’s possibilities and content?

It is the technical and design barriers that will be crucial for on-demand media’s success in Denmark. Radio on-demand has its own niche in the Danish soundscape. A niche that no other media has. A niche that, along with the smartphone’s continued developments in user-friendliness as well as an increasingly individualised media use, is well-positioned to grow out of its niche existence and capture a part of the Danish mainstream consumption.

Whether this development will take its first big step in 2016 will be determined by the extent to which the Danish market can meet user requirements at the technical and design level, so that the barriers that will always exist against new forms of media can be overcome – also in Denmark.
Which media is preferred for news and background?

Period: 2015
Target group: 20-35
Source: TNS Gallup Social Media Life

- TV: 69%
- Facebook: 48%
- Internet: 59%

Media Development 2015
The users are taking control of the news

In recent years, news consumption on social media has increased, while it remains relatively stable on radio and on TV. A study of younger Danes’ news consumption on social media shows that they receive far more news through social media than they are aware of.

By Jacob Lyng Wieland & Peter Niegel
DR Audience Research
Social media – with Facebook in the lead – is increasingly being used to read the news, which changes the way in which we get our news. A third of Danes currently indicate social media as one of their preferred news sources, and among the 20-35 age group, the figure is 50 %. On social media, the news enters a new context in which it merges together with private holiday snaps and status updates from friends. DR Audience Research has studied what happens to the use and the understanding of news when social media provides the framework. We have therefore followed 20 young Danes who have a high consumption of both news and social media in order to examine the impact of news on social media.

Throughout the study, participants experienced using social media significantly more often in their news consumption than they generally believed. The reason why social media takes up more of users’ time without usage being perceived or registered as news consumption by the users themselves, can be attributed to several factors. It is especially clear from the study that news on social media isn't the first thing that comes to mind when respondents are asked where they get the news. Most often, users think of the more traditional news media when explaining their own news consumption. Secondly, the difference can be attributed to the fact that the news stream on social media such as Facebook imperceptibly drifts along with users’ personal news and is therefore not experienced as news updates. The study identified two functions of news consumption on social media which imperceptibly and surely increase the consumption of news. These functions concern personalisation and filtering.

THE NEWS STREAM HAS BEEN PERSONALISED

The personalisation of the news stream on social media is characterised by the fact that study participants are increasingly following people or organisations as opposed to more traditional news brands from the radio, television and print industries. This therefore represents a shift from seeing and hearing news through established news providers to following people or organisations with more subjective views on current news. A development that may ultimately end in news consumption in Denmark taking place in a large number of small communities or so-called echo chambers, where in each community users will be exposed to the same news and news angles – without a common frame of reference in relation to the larger community.

The study participants were themselves aware of the challenges of the echo chamber, but the echo chamber must not be understood as solely negative. The echo chamber also creates cohesion, where users experience the sharing of opinions and values with their social circles. Personalisation is also an opportunity for users to challenge journalism’s established gatekeeper function. It allows users to follow the politicians they agree or disagree with, and thus receive their messages untouched by journalistic processing.

Most study participants primarily follow the politicians they agree with and thus the viewpoints that they wish to subscribe to. However, there was also a participant who followed a range of politicians from the other political wing in order to challenge his/her own views. Personalisation doesn’t have to pertain only to politicians or people; it can also be in relation to institutions, such as the police. Many participants explained that they follow their own regional police to stay updated on events they may need to be aware of in their own immediate neighbourhoods.
### WHICH MEDIUM IS PREFERRED FOR NEWS AND BACKGROUND?

**Period:** 2015  
**Source:** TNS Gallup Social Media Life

<table>
<thead>
<tr>
<th>Medium</th>
<th>12+</th>
<th>20-35</th>
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<td>TV</td>
<td>79%</td>
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<tr>
<td>National newspapers</td>
<td>23%</td>
<td>14%</td>
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</tbody>
</table>
FRIENDS ARE THE NEW EDITORS
Filtering the news stream on social media relates to news increasingly finding its way to the user’s Facebook page through friends who upload, refer, filter and comment on the news on social media. This is news distribution in which the news consumer does not receive an authoritative news coverage directly from outlets such as DR or TV 2, but instead sees a news story on Facebook, for example, which originally had one angle but which, through filtering, may be remixed so that the story’s angle is completely transformed. The study indicates that certain news types are favoured in the filtering process on social media, and that news types that would not currently meet importance requirements set by traditional media outlets are increasingly playing a much larger role on social media. This applies especially to news stories that arouse emotions. The stories can be both those that make readers smile and laugh, or stories that arouse outrage and indignation. There is no doubt that these are the types of news stories that advance in a world where news is also something that users share with one another. The study showed, for example, that a story of a lesbian couple in Mariager, who were harassed and also had their windows smeared with dog faeces, was massively shared on Facebook. The story is a good example of how outrage and injustice have become strong drivers of sharing content and news on social media.

A FRAGMENTED NEWS PICTURE
Danes will continue to use social media to read and find the news. This situation has already led to a loss of control for the traditional media, and there is nothing to suggest that this loss will not simply accelerate going forward. The news that is shown to the individual is no longer selected on the basis of what the media believes is important and relevant, but on the basis of what is being shared and how the Facebook algorithm decides to display the news in the feeds. This will have an impact on news distribution in that access to the news is being created on entirely different terms than before. Even now, media groups such as the American-based Huffington Post operate by gradually modifying and developing their stories as they are shared and generate debate on social media.

But let it also be said that there is of course a very large group of Danes who do not avail themselves of the opportunity to share news, comment on news, or react to the news shared by their friends. Approximately 40% of Danes do not see news content via Facebook during any given week. The trend, therefore, is not pointing in any clear direction. It leaves a very fragmented picture in which news is consumed differently on different platforms, where the selection of news is not always up to the front-page editor, and where the angle of the news can be challenged.

About the study
At the end of 2014, DR Audience Research conducted a study of young Danes’ news consumption. During a week, we observed 20 Danes aged 20–35 with a high consumption level of news across media platforms. The users were also frequent users of social media. The study used the methodology of mobile ethnography to gather data. This means that participants regularly documented their news consumption with the help of their mobile phones. They also commented on and explained the significance of their news consumption. Finally, all participants attended focus groups held on the subject.
The media is talking about it, but where are the users?

The Danish media landscape often goes into overdrive when new media phenomena appear. Some of these phenomena receive a disproportionate amount of publicity, even though relatively few people actually use them. This disparity between use and publicity is known as 'hype'. But how can you be certain that the massive amount of publicity generated in the past few years matches the spread of the phenomena? Here, we provide the big picture to help you avoid falling into the hype trap.

By Michael Oxfeldt & Rasmus Thaarup
DR Audience Research
A LOT OF HYPE / NO ONE USES IT

Twitter and its little sister Periscope work as a sort of Intranet for media professionals, journalists and politicians – places where they can tweet and live-stream to one another in peace and quiet without the rest of the population noticing it.

If we are to believe the hype surrounding the Tinder dating app, the word ‘dating’ actually should be replaced with ‘swiping.’ But it doesn’t look like good old-fashioned analogue dating will be swiped left any time soon.

“Everything is about Netflix. Except Netflix. Netflix is about House of Cards.”
Frank Underwood.

One of today’s most highly hyped podcasts, Serial, found its way to less than 1% of Danish ears. You are of course welcome to get in touch with the editors responsible for this article if you too are not completely sure what a podcast is.

“Apple’s new INSERT PRODUCT will revolutionise the way in which you INSERT BEHAVIOUR!”

A LOT OF HYPE / EVERYONE USES IT

You are there. Your kids are there. And your mother is there. Facebook is the new mass media that you cannot and do not dare not be a part of. And just when you think it is dead, they offer a smart new function that gets you back on the hook – just like when a new judge enters the panel on X Factor.

You will probably recall the frustration of text messages loaded with incomprehensible letter combinations like ROFL, OMG and YOLO – or the boss’s lame attempt to soften a written order with a :-). Digital language has fortunately evolved ever since, and with the massive advance of the emoji we need never be in doubt about whether one’s mother-in-law has problems with punctuation in her text messages, or if she just thinks you need a proper tongue-in-cheek smiley. LOL!

NO HYPE / EVERYONE USES IT

EPG and apps are all well and good. But you still use teletext when you want to find out what’s on TV, check the sport scores or if you can’t understand what they’re saying on The Bridge. You just don’t tell anyone – because you don’t actually use teletext, do you?!

NO HYPE / NO ONE USES IT (YET)

Danish weather is no longer in the shelter of the Norwegian mountains. YR is well on its way to giving Danes better weather coverage through their smartphones without the media or one’s friends taking notice.
THE HYPE QUADRANT

The relationship between a number of (almost randomly) selected media and media phenomena’s spread and hype.

Period: 2015
Target group: Genuine respondents who do not work in the media industry
Source: Epinion for DR Audience Research, TNS Gallup, gut feeling

A lot of hype / No one uses it  A lot of hype / Everyone uses it  No hype / Everyone uses it  No hype / No one uses it

A LOT OF HYPE

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About the TV Meter measurement
The TV Meter measurement underwent complete restructuring in 2015. The key figures of the measurement represent the segment of the population with a TV in the household. The change has taken place because the number of Danes with no TV in the household has exceeded 5%. Previously, this level has been lower. The change has not resulted in a methodological change in the survey, which is why the key figures from 2015 are still comparable with those from previous years.

The DR Panel
The data in this publication also derives from surveys conducted in DR’s own internet panel, the DR Panel. DR uses the DR Panel to regularly survey the media habits of Danes and their perception of media content. Anyone aged over 15 and residing in Denmark may become a member of the DR Panel. You can join the DR Panel and read more about it online at www.dr.dk/drpanelet.

About DR Audience Research
DR Audience Research is DR’s own research department. It is an independent department tasked with providing the perspectives of listeners, viewers and users on DR’s wide range of products and with tracking media development.

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